Did You Know

Contents

1 Did You Know

This guide is intended to help you discover features delivered with the *CALIDUS* ePOD application.

1.1 Mobile Device Application

1.1.1 Job Reference

The Job Reference shown on the device in all the screens is controlled through configuration against the site, through the *Display Job Code on PDA* setting. You can configure it to show the following by default:

- *Job ID.*
- *Job Code.*
- *SO Number.*
- *Customer Ref.*
- *External Ref.*

What you select here will be used on the device, as long as it contains a value.

If there isn't a value, the job code (the order number) will be displayed instead.

If there isn't a job code, the device will display the unique job ID (generated by *CALIDUS* ePOD).

The screens that display this are:

- Job List (the list of all jobs on the load)
- Job Details (when starting or arriving)
- Collection/Delivery screens (when confirming pallets)
- Customer/Driver Signature screen

On the device, there is also some functionality available to show all the references that the system holds against a particular job.

Simply click the job reference label and the device will show a popup of all the references for that job.

This functionality is available on the following screens:

- Job Details.
- Collection/Delivery.

It is not available on the Signature screen, however.

References:

- Site Admin Page
- PDA Job List
- PDA Job Details
- PDA Collection
- PDA Delivery
- PDA Job Confirmation

1.1.2 Change Navigation on TomTom WEBFLEET devices

On TomTom WEBFLEET devices, when you click the map icon on the Job Details screen, the application will switch to the WEBFLEET navigation app, where the order required can be selected from WEBFLEET's Work List.

However, the *CALIDUS* app also allows you to directly navigate to the job address instead. If you long-press on the map icon it will display a list of "Navigate without WEBFLEET Order?" options:

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- *Once* - Only this job will navigate directly to the job address.
- *Remember for Load* - the button will default to navigate directly to the job address for all jobs on the load.

Long-pressing the map button again will give "Navigate with WEBFLEET Order?" options, allowing this to be reset.

References:

- PDA Job Details

1.1.3 Adding Extra Data Entry

CALIDUS ePOD includes the ability to add additional data entry prompts at many stages - this is called User Defined Fields and User-Defined Forms, or UDF for short.

You can add any number of any type of data entry fields to the following mobile device screens:

- Vehicle Checks - for different vehicle types.
- Load Start.
- Job Arrival Signatures.
- After arrival.
- Collection/Delivery Details.
- Additional Container information.
- Additional Product information - for individual product groups.
- Service Pre-checks - for different product groups.
- Service Information - for different product groups.
- Service Diagnosis - for different product groups.
- Service Post-checks - for different product groups.
- Terms and Conditions for customers and drivers for different job types.
- Exceptions - when cancelling, changing or clausing, and can be dependent on the reason code selected.
- Load End.

The configuration can be based on site or the job group the job is in. Other configuration levels are also available and indicated above. When part of a job matches this criteria, the mobile device application screen will display the UDF form for entry.

References:

- User-Defined Fields

1.1.4 Custom Device Styling

As part of most implementations, we offer to style the mobile device closer to your needs. Typically, the standard setup of the application and styling results in your logo being displayed on the device, with most information displayed as required.

However, almost all of the application can be styled to some degree, in terms of size, colour, whether the items are displayed or not and in some cases position on the screen.

The most common styling elements concern the following:

- Job List
- Collections/Deliveries
  - ♦ Container List
  - ♦ Product List
- Services
  - ♦ Service Products
- General
  - ♦ Terms

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Note that you can configure or remove elements or add functionality to screens through the standard Site, Job Group and UDF configuration.

References:

- Custom Device Styling
- Site
- Job Groups
- UDF Configuration
- User-Defined Fields

1.2 Administrative Console

1.2.1 Opening Multiple Tabs

Sometimes you will find it useful to have multiple pages open from the *CALIDUS* ePOD Admin application, for example for looking up customers.

Any link (usually denoted with an underline) in a page can be clicked while the Control key (Ctrl) is held down, and that will generally open up in a new tab or window on the machine.

You can start a screen in another tab or window from the menu - click the icon to the right of the menu item and this will open in a new tab or window.

Note: This functionality is typically dependent on the capabilities of the browser being using, so check capability and settings.

Note: The last screen you open from the menu is the screen for which help will be displayed when you click the **Help on this screen** button in the screen title - opening multiple tabs like this may result in unexpected results, so in this case it is better to search for or navigate to the screen for which you require help using the *CALIDUS* Assist home page and search facilities.

References:

- Admin User Guide

1.2.2 Adding Data to Results tables

Most screens allow you to show or hide the columns in the results table by clicking on a **Select Columns** button. When you press this, the screen displays a pop-up of all the columns that can be shown or hidden. There are some columns that you can't hide - these will not be shown on this list.

To show or hide the columns, check or un-check the items in the list respectively. When you click **Save**, the changes will be applied to the results table. If you click **Close** (or anywhere else on the screen behind), the screen will *not* make the changes.

This is especially useful on the Jobs screen, where there are dozens of columns shown. You can customise this based on your business requirements. For example, if you use products, you can show the product description and quantity on the jobs results table. If you are dealing with costs, charges and total value, to can see the charge information, quantity and value as well as the total product value here as well.

The application will remember your settings for the screen on that particular browser on that machine.

References:

- Admin User Guide

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1.2.3 Using your Business' Terms

CALIDUS ePOD is in the process of being updated so that the main screens will allow you to define your own terms that relate to standard system names.

For example, what the system calls a "Load", you might call a "Manifest" or a "Workload".

You can use the Terms Maintenance screen to define these terms, to make the system more comfortable for you to use.

💡 **Note:** When you change a term and apply it, it changes for all Admin users.

At this time, this is limited to the following screens:

- Loads
- Jobs
- Job Details (Products and Containers)
- Job Assign
- Job Sequencing
- Customer Maintenance
- User Tracking
- Import/Export Audit

As we update the system all the time, this list will grow.

References:

- Terms Maintenance

1.2.4 Tracking on a Map

The mobile device commonly tracks its position and tells the system where it was when actions are taken. The system stores this information and can be displayed in the User Tracking screen.

This screen can be used on its own to select data and then see the point on a map, if co-ordinates are provided.

However, you can also see this from different areas of the system, pre-selecting the data based on from where the screen was called:

- Vehicles
- Users
- Loads
- Jobs

When you go to the User Tracking screen from these screens, the data is pre-selected based on from where it was called.

If you run the screen like this, or if you choose to see data from specific loads, jobs, users or vehicles, the screen will also display a **Map** button in the header, which will show all the tracking waypoints linked together.

References:

- User Tracking
- Vehicles
- Users
- Loads
- Jobs

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1.2.5 Customising the Logo

You can change the logo displayed in the top-left of the Admin system if you want to.

This can be changed in the Site screen.

💡 **Note:** When you change this, it changes for all Admin users who use this site.

References:

- Site

1.2.6 Customising Completion Reports

At this time, OBS Logistics design all completion (POD/POC/Service) reports. However, there are normally some elements that you can easily change in the system.

If you change the Site or Job Group logo, this will typically change the logo displayed in the Completion report.

If you change the Site Name, Address and contact details, this will typically change the address in the Completion report. Simply find the customer with the same code as the Site ID and change it there.

Alternatively, some reports use the Job Group address instead - simply find the customer with the same code as the Job Group and change it there.

References:

- Site
- Job Groups
- Customers

1.2.7 Maintaining Reference Data

If you are more comfortable maintaining standing reference data in a spreadsheet, you can achieve this in *CALIDUS* ePOD as well.

Several Standing Data Maintenance screens allow you to:

- Download a template.
- Download existing standing data.
- Upload new or modified data.

The reference data that can be modified this way is:

- Codes - including reason codes, DU types, UOMs and Clause codes.
- Vehicles.
- Service Products.
- Service Activities.
- Vehicle Products.
- Customers.
- Time and Expense categories.
- Users - drivers and admin users.

The screen will usually show you an **Upload** button to show these options.

💡 **Note:** Be aware that, if *CALIDUS* ePOD is linked to a transport management system, it's likely that all this standing

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reference data is updated automatically from that system, so check before modifying data in *CALIDUS* ePOD.

References:

- Codes
- Vehicles
- Service Products
- Service Activities
- Vehicle Products
- Customers
- Time and Expense Categories
- Users

1.2.8 Downloading Photos

When the driver completes jobs, part of their process may be to take photos on the device. These photos are stored back in *CALIDUS* ePOD and you can view them in various screens, like the Jobs screen - you can click on a job, use the **Select** action button and click on the *Photos* tab to view any photos that were taken.

Your browser can also view, zoom in and download the photos directly from this screen. The process is slightly different per browser - the instructions for Chrome (and any other browsers based on Chromium) follow.

To view the photo full-screen:

- right-click on the photo and select *Open image in new tab*.

To zoom in:

- Use Chrome's web page zoom commands from the main Chrome menu.
- As a shortcut to this, you can hold down the control (Ctrl) key on your keyboard and scroll up to zoom in, or scroll down to zoom out.

To download the photo:

- Right-click on the photo and select *Save image as...*.
- In the pop-up *Save as* file browser, name the file and save it to anywhere on your PC or network-accessible area.

You can do this from the image in *CALIDUS* ePOD or on an image you opened full-screen.

💡 **Note:** This functionality is typically dependent on the capabilities of the browser being using, so check capability and settings.

References:

- Jobs
- Container Details
- Loads

1.3 Other Systems

1.3.1 Providing Customers Tracking Information

CALIDUS ePOD will execute your jobs for you, provide you with all the information gathered from the customer and even automatically email reports of the finished jobs to your customers, if you want it to. But what if you need more?

OBS Logistics Ltd also provide *CALIDUS* Portal TTM - a track and trace module that you can provide access to your customers so that they can:

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- See ETAs for their jobs.
- Track the vehicle delivering their jobs.
- Query the quantities delivered or collected.
- View and print the completion report.

CALIDUS Portal is also a really useful tool for your transport team, to help them plan and visualise the amount of work that they have to complete, and your customer service team will appreciate the available tools for them to help with their workflow when dealing with customer queries.

Ask your OBS Logistics representative about *CALIDUS* Portal and see what it can do for you, or visit our website for an overview:

https://www.obs-logistics.com/obs-logistics/our-software/track-and-trace

References:

- EPOD-TTM Interface

1.3.2 Communicating with Other Systems

You may be using *CALIDUS* ePOD with your own planning system, say an enterprise resource planning (ERP) system, a warehouse management system WMS or transport management system (TMS).

OBS Logistics Ltd offers a full suite of management solutions across a range of different activities and *CALIDUS* ePOD works with them. Ask your OBS Logistics representative about the full *CALIDUS* suite of products, or visit our website here:

https://www.obs-logistics.com

CALIDUS ePOD can receive loads, jobs and set-up (standing) data from your planning system - we support proprietary CSV and XLS uploads, as well as industry-standard XML web services so your system can send this information to us without you having to key these jobs in manually.

When jobs are complete, *CALIDUS* ePOD can automatically send out updates to these system, through a variety of industry standard mechanisms.

Your customers may also have systems that they want updating, for example, pallet network tracking systems. *CALIDUS* ePOD has standard interfaces for the following customer systems:

- Dynamics NAV.
- Palletforce.
- Pall-Ex.
- TPN - The Pallet Network.
- Europa Shipping Services.
- GAP.
- Palletline.
- Hazchem.
- TomTom WEBFLEET.

You can configure a job to update any number of systems by creating export configurations and attaching them together against a job group or your site, or even against an owner of the job, so you can update all your customers with the right information, when they need it.

If the system you are interested in isn't on the list, don't worry - it may be that the other standard interfaces the product supports will get what you need. For example, the system can push the completion reports out with some basic information, so they can be added to your document management system.

Failing that, OBS Logistics can develop an interface just for you - contact your OBS Logistics representative for more

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information.

References:

- CALIDUS ePOD Interfacing
- Standard Interface Configuration

1.4 *CALIDUS* Assist

1.4.1 Searching for Help

Although all pages from your *CALIDUS* system link directly to the appropriate page in this *CALIDUS* Assist guide, you can search for help on anything in the system using the search bar. It depends on how you have *CALIDUS* Assist configured, but this search bar is normally either in the title at the top of the screen or in the toolbar on the left.

Did you know that you can activate this search at any time using a shortcut key combination? Hover over the Search bar now and you will see it sells you the hot-key combination, typically ALT-F or ALT-SHIFT-F. Hitting those keys together will activate the search box and you can type in what you're looking for. Be aware that these shortcuts are dependent on the browser that you are using, so check for compatibility first.

If you know the name of the page, just type it there and click the **Go** button. If you want to search for any text in the page, click the **Search** button instead, or just hit enter for *CALIDUS* Assist to do it for you. Typically, as you type, the search bar will quickly offer you some matches that might be what you're looking for - if it is, just click the suggestion and Assist will take you there.

Some tips on searching:

- If you enter multiple words (like "fixed drop scheduling") without quotes, the search routine will find you pages that match any of the words, but ordered in the most likely order (i.e. with most matches of most words)
- If there is a page called "fixed drop scheduling", you will be taken straight to it.
- If you enter your search with quotes i.e. "fixed drop scheduling", it will find that specific phrase in the pages, rather than any of the words.
- If you enter plus instead of space i.e. fixed+drop+scheduling, you will only get pages in the results that have all 3 words in them, anywhere in the page, in any order.
- You can also control partial word matching with as asterisk. So let's say you are searching for a parameter called AUTO_SCHED something-or-other. Searching for AUTO_SCHED will not bring back any results, as there are no full words or phrases like that. But if you enter AUTO_SCHED_* instead, it will search for words *starting with* "AUTO_SCHED" and bring you back some matches.

1.4.2 Printing and Exporting

You can export pages from *CALIDUS* Assist using the *Print as PDF* tab in the tab bar, typically on the top of the screen.

You can export categories as a full document in the same way - all pages in that category will be included in the PDF in the order in which they are listed in the category.

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